



A financial planning firm founded in 2008, PWM was established to address client needs with solutions in an unbiased, non-proprietary environment. The vision was to introduce a business model that engaged people in informed, trusting relationships that would enable them to achieve their ambitions and dreams built around an agreed-upon financial plan. These relationships would be comprehensive in nature; established upon a foundation of professional competency and transparency, coupled with client education and a combined commitment to service beyond what is commonly experienced within the financial industry.

In today's competitive financial services environment, most firms have myriad products and services at their fingertips, however many institutions are bound by or biased toward selling proprietary financial products, which has magnified the need for honest and unbiased advice. PWM was created as a solution to such conflicts of interest. An independent wealth management practice free of proprietary products, you can trust your PWM Wealth Manager will be objective, work in your best interest and implement your plan with best-in-class solutions.

Prentice Wealth Management provides a preeminent wealth management experience to those appreciating a partner focused on superior service. By retaining a select group of Wealth Managers in counsel to a limited number of clients, our Wealth Managers work collaboratively to address the needs of families and small business owners from our Rochester, NY office.



Provide honest and unbiased advice, unbound by any influence from proprietary products.

Be objective and always work in our client's best interests.

Work collaboratively to implement best-in-class solutions.



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Securities offered through Cadaret, Grant & Co., Inc., Member FINRA/SIPC

Advisory services offered through Prentice Wealth Management, LLC, an SEC Registered Investment Advisor. Prentice Wealth Management, LLC and Cadaret, Grant & Co., Inc. are separate entities.

William J. Prentice II AWMA®, CFP®, CIMA® is licensed to transact securities business in the following states:

CA, CT, DC, FL, GA, HI, IN, MD, MA, MI, NJ, NY, NC, OH, OR, PA, RI, SC, TX, VA & WA.

Prentice Wealth Management, LLC (PWM) is a Registered Investment Advisor that is registered with the United States Securities and Exchange Commission ("SEC") and is notice filed in the state of New York and Florida. PWM only provides investment advisory services in states where it is notice filed or where it qualifies for an exemption. Our Form ADV is available upon request.

